

Montgomery County Public Libraries FY11 Performance Review

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CountyStat Principles

- **Require Data-Driven Performance**
- **Promote Strategic Governance**
- **Increase Government Transparency**
- **Foster a Culture of Accountability**



Agenda

- **Welcome and Introductions**
- **Historical Budget Overview**
- **Review of Departmental Performance**
 - Headline Measures
 - 2011 Customer Service Survey
 - Draft Headline Measures on Return on Investment and Total Use
- **Linking Headline Measures to Current Budget Programs**



Meeting Goals

- **Determine the impact of Montgomery County Public Libraries programs and activities on headline measures and establish new performance expectations and goals**
- **Review ongoing departmental data collection efforts and discuss future projects that will further incorporate data into the decision making process**
- **Discuss linkages between headline measures and budget programs**



Historical Budget Overview

	FY05	FY06	FY07	FY08	FY09	FY10	FY11	FY12
Libraries Operating Budget	31,921,900	34,383,690	38,357,360	40,466,660	40,405,130	37,729,520	28,950,370	28,475,300
Libraries Budget as % of Total MCG Budget	2.62%	2.59%	2.59%	2.56%	2.47%	2.31%	1.90%	1.78%

Libraries Workyears	401.9	403.2	419.9	427.6	426.4	386.9	290.9	288.0
Libraries Workyears as % of Total MCG Workyears	4.5%	4.4%	4.4%	4.3%	4.2%	4.0%	3.2%	3.2%

This historical budget comparison compares MCPL to the Montgomery County Government Budget, not including Public Schools or Parks



MCPL Current Headline Performance Measures

1. Circulation Of Library Materials Per Capita
2. Library Visits Per Capita
3. Cost Per Circulation
4. Percent Of Library Customers Satisfied Based On The Library Customer Survey Results
5. Return on Investment (*Under Construction*)
6. Total Library Use (*Under Construction*)



CountyStat Use of Fairfax County for Headline Measure Benchmark Analysis

CountyStat used data from Fairfax County to serve as a benchmark for headline measure performance due to similarities between the two jurisdictions in terms of demographics, budget, and geographic location

▪ Fairfax County Current Branches and Historical Budget

- 23 branches (8 regional, 14 community & Access Services) operating in the system. Access Services provides assistive devices and materials to the visually impaired.

	FY05	FY06	FY07	FY08	FY09	FY10	FY11	FY12
Operating Budget*	\$ 27.9 M	\$ 29.5 M	\$ 30.4 M	\$ 33.5 M	\$ 33.1 M	\$ 28.4 M	\$ 26.1 M	\$ 26.0 M

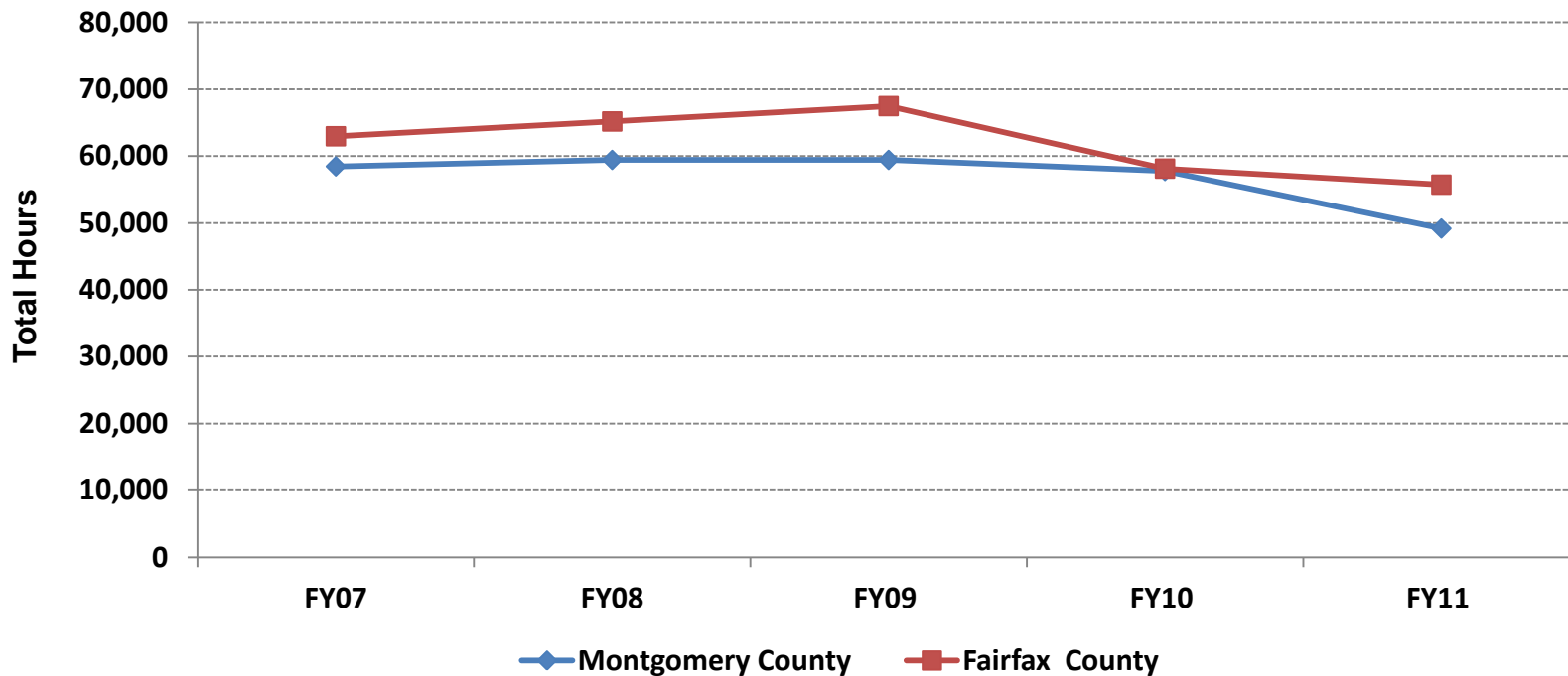
▪ Montgomery County Current Branches and Historical Budget

- 20 library branches, Noyes library for young children, and Montgomery county correctional facility library

	FY05	FY06	FY07	FY08	FY09	FY10	FY11	FY12
Operating Budget	\$ 31.9 M	\$ 34.4 M	\$ 38.4 M	\$ 40.5 M	\$ 40.4 M	\$ 37.7 M	\$ 29.0 M	\$ 28.5 M



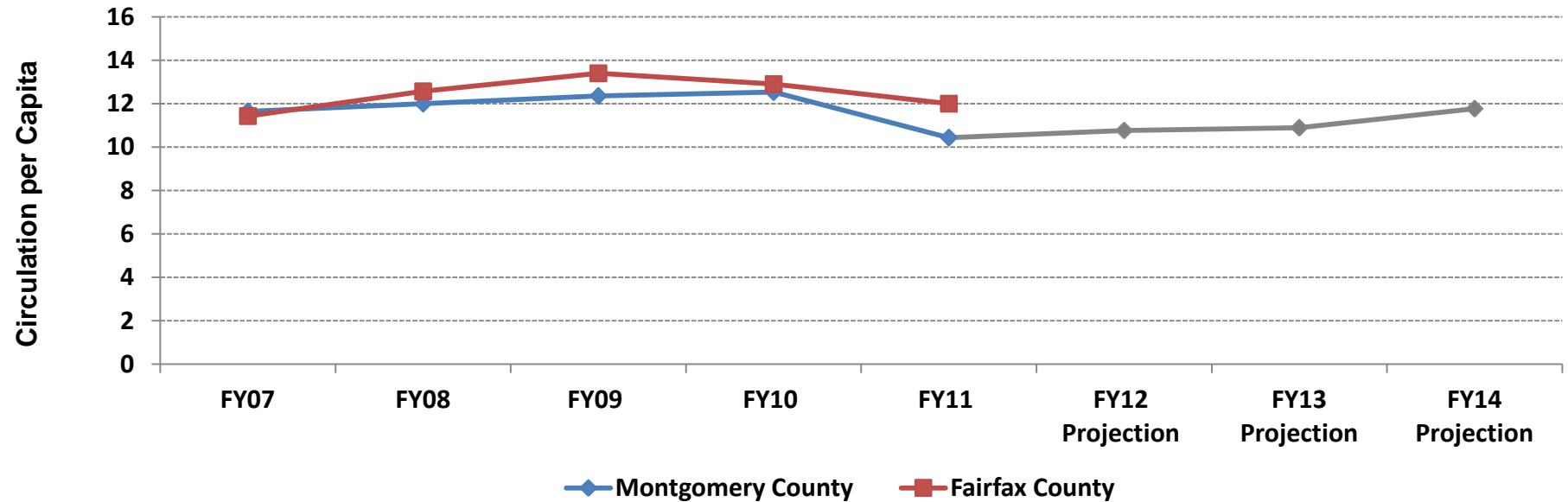
Supporting Measure: Total Hours



Jurisdiction	FY07	FY08	FY09	FY10	FY11
Montgomery County	58,455	59,425	59,425	57,764	49,164
Fairfax County	62,960	65,174	67,473	58,119	55,724



Headline Measure 1: Circulation Per Capita

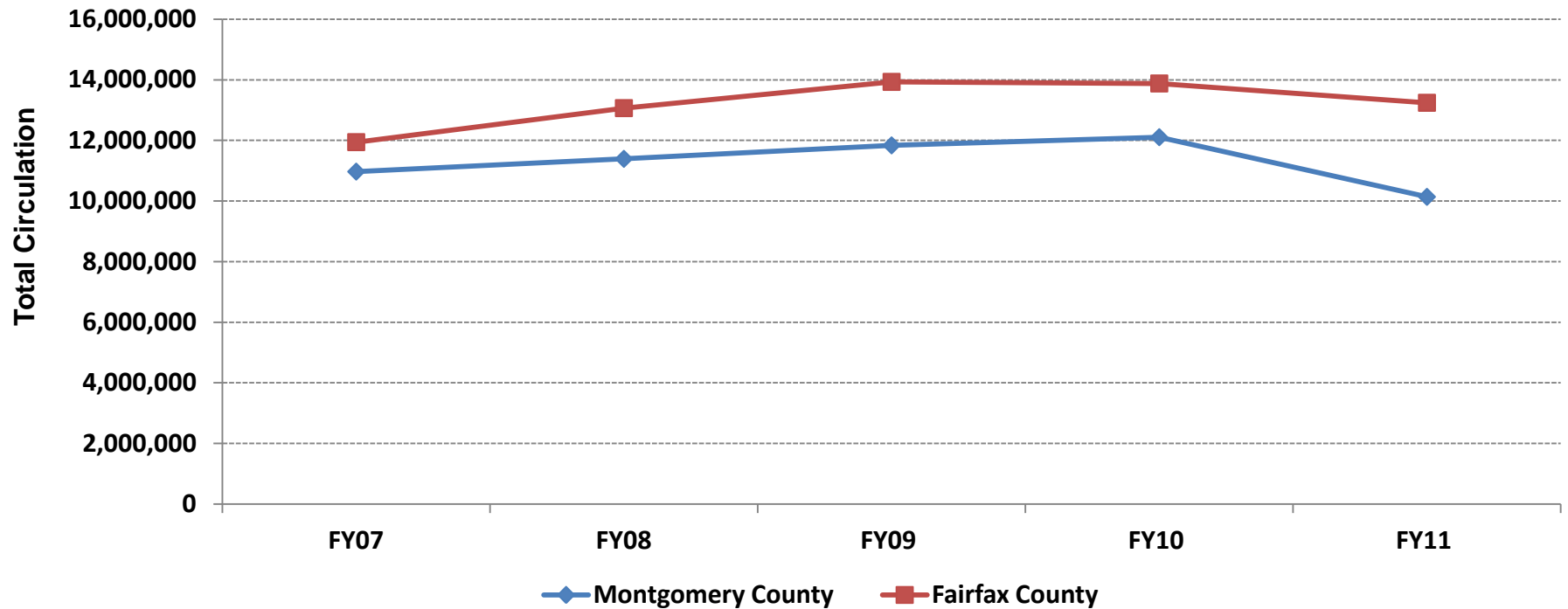


Jurisdiction	FY07	FY08	FY09	FY10	FY11	FY12 Projection	FY13 Projection	FY14 Projection
Montgomery County	11.65	12.00	12.36	12.53	10.44	10.77	10.89	11.77
Fairfax County	11.43	12.57	13.40	12.90	12.00			

During this period each system experienced a decline in materials budgets with 50% decrease from FY08 to FY11 in Montgomery County and a 37% decrease in the last three years for Fairfax County



Supporting Measure: Total Circulation



Jurisdiction	FY07	FY08	FY09	FY10	FY11	FY12 Projection	FY13 Projection	FY14 Projection
Montgomery County	10,970,744	11,390,866	11,836,563	12,105,851	10,137,952	10,543,470	10,743,470	11,693,470
Fairfax County	11,942,788	13,065,309	13,931,027	13,879,073	13,241,259			



Headline Measure 1:

Circulation Of Library Materials Per Capita

▪ Departmental Explanation for FY11 Performance:

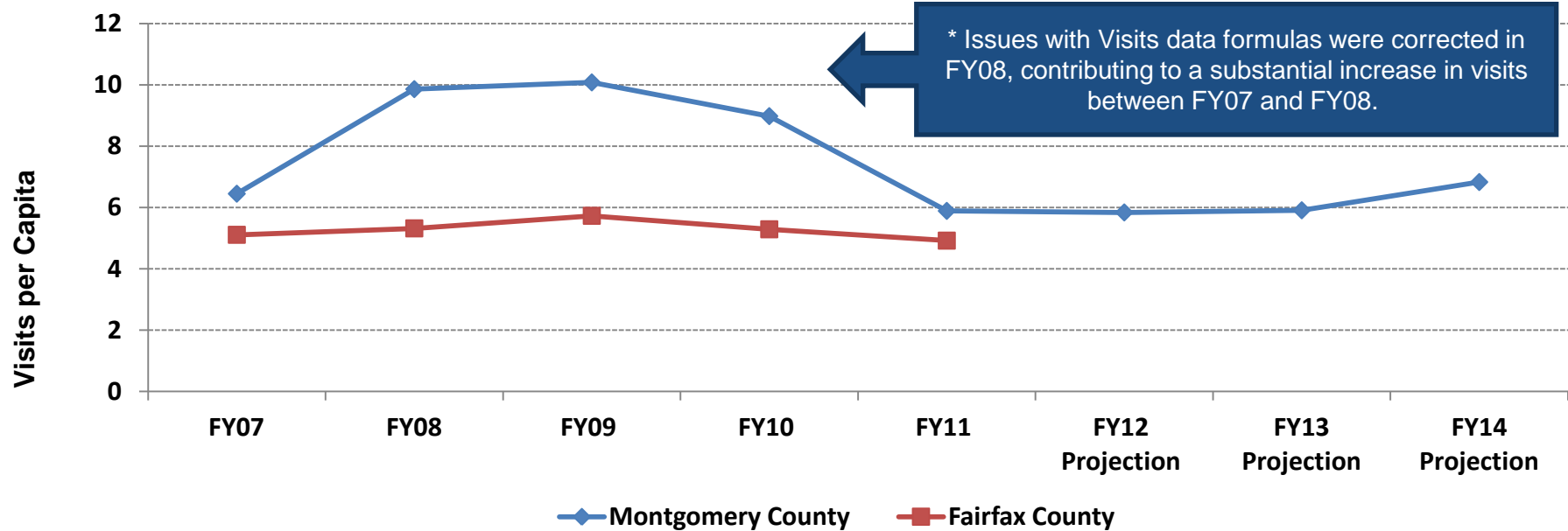
- Reductions:
 - 15% Hours Reduction
 - 45% library materials reduction
 - Two branches closed for renovation
 - Programming reduction, particularly summer reading
 - Information staff reduction, less available to answer questions and conduct reader's advisory
- Department Efforts To Minimize Negative Impact Of Reductions:
 - Reorganization and staff redeployment to match skill sets to needs and adjust to usage changes
 - Change materials selection to better meet demand within constraints
 - Diversified Funding – Obtained grants for library materials, technology

▪ Departmental Explanation for FY12-FY14 Projections:

- Partial restoration of library materials back towards FY08 levels (FY12)
- Re-opening closed branches late FY13/FY14 (if both staff and opening materials collection funded)
- Strategic Plan (including Technology Plan)
 - Review of Demographic/Census Data
 - Technology improvements & enhancements to self-charge machines, collection analysis software, library catalog/website enhancements, customer holds



Headline Measure 2: Library Visits Per Capita

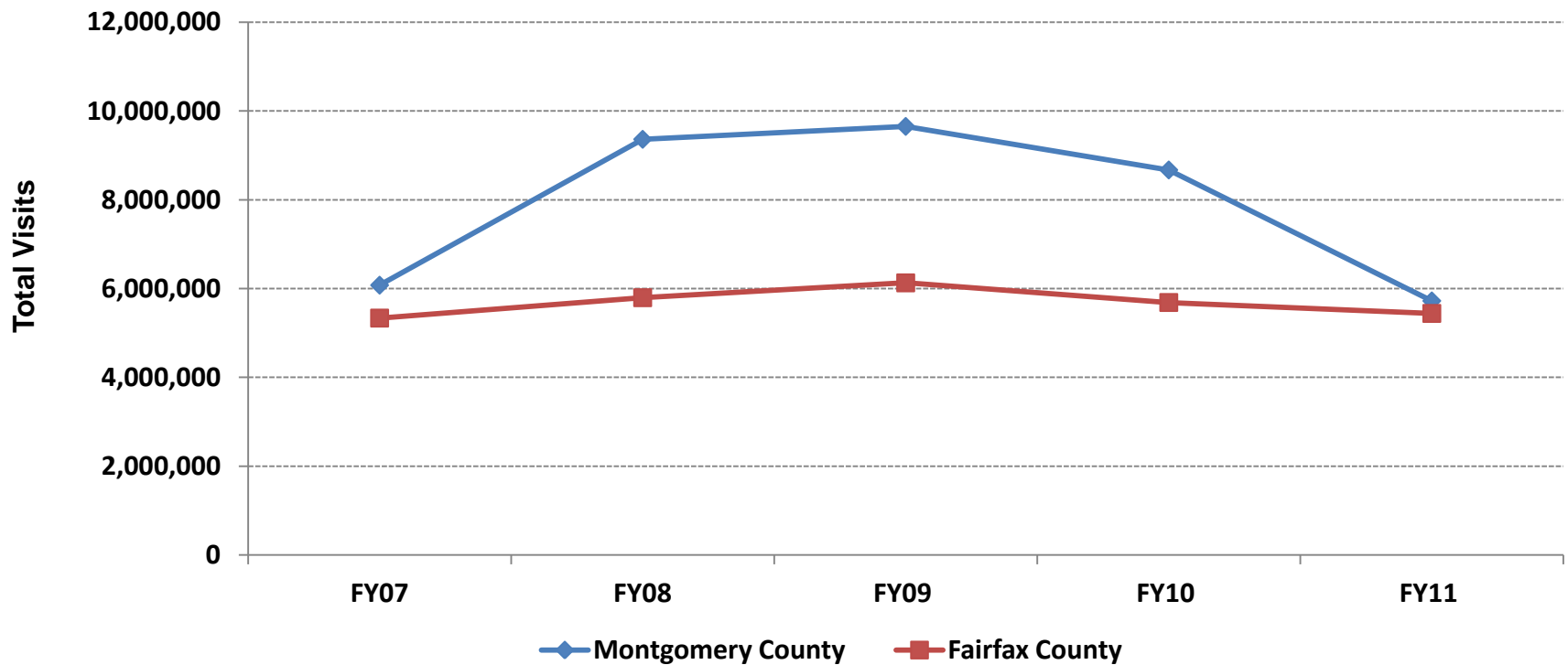


Jurisdiction	FY07	FY08	FY09	FY10	FY11	FY12 Projection	FY13 Projection	FY14 Projection
Montgomery County	6.45	9.86	10.08	8.98	5.89	5.84	5.91	6.83
Fairfax County	5.11	5.32	5.73	5.29	4.92			

Despite consistently higher circulation rates in Fairfax County, the higher visit rates for MCPL indicate the use of libraries for reasons other than materials



Supporting Measure: Total Visits



Jurisdiction	FY07	FY08	FY09	FY10	FY11	FY12 Projection	FY13 Projection	FY14 Projection
Montgomery County	6,075,790	9,361,410	9,652,196	8,671,615	5,722,203	5,711,203	5,831,203	6,786,203
Fairfax County	5,334,827	5,794,036	6,128,289	5,685,827	5,439,426			



Headline Measure 2: Library Visits Per Capita

▪ Departmental Explanation for FY11 Performance:

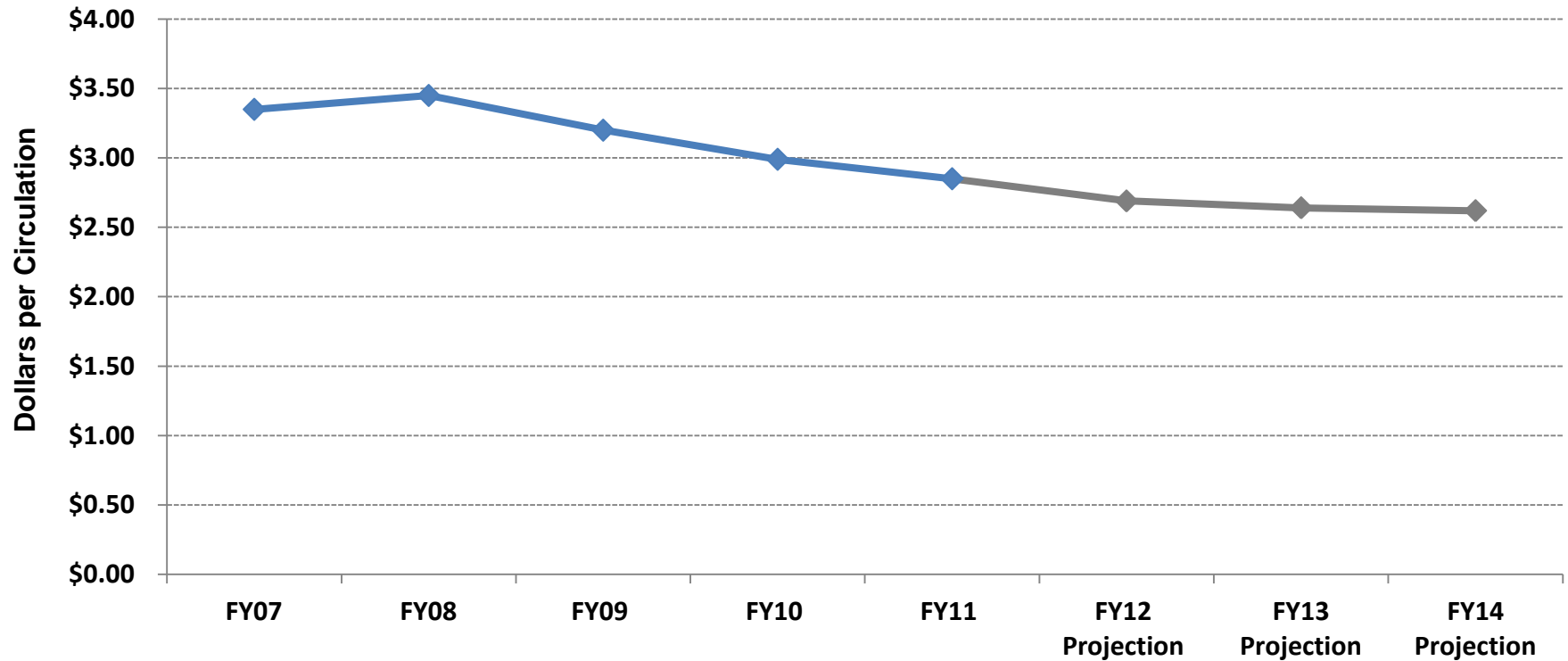
- 15% reduction in library service hours & decreased materials and programming options
- Facility Issues
 - Closure of two high-volume branches for renovation
 - Branch closures driven by weather, power, facility repairs
 - Decreased cleanliness and deteriorating physical conditions
- Department measures to minimize impacts:
 - Gaithersburg Interim branch (targeted materials selection worked, high use for a small branch)
 - Structured reduced hours into more uniform, convenient packages (restoring cut/underserved hours at Germantown and Quince Orchard in the UpCounty, opening until 6pm on Friday and Saturday, year-round Sundays at seven locations)
 - Training staff to better market and merchandize the items we have in the collection

▪ Departmental Explanation for FY12-FY14 Projections:

- Partial restoration of library materials back towards FY08 levels (FY12)
- Re-opening closed branches late FY13/FY14 (if funded)
- Improvements to selection methodology/process (FY12)
- Improvements to programs for customers, within resource constraints
- Strategic Facilities Plan
- Continued focus on early literacy programming, displays, and Teen Spaces, which are assets in terms of bring interested customers into the branch



Headline Measure 3: Cost Per Circulation



FY07	FY08	FY09	FY10	FY11	FY12 Projection	FY13 Projection	FY14 Projection
\$ 3.35	\$ 3.45	\$ 3.20	\$ 2.99	\$ 2.85	\$ 2.69	\$ 2.64	\$ 2.62



Headline Measure 3: Cost Per Circulation

- **Departmental Explanation for FY11 Performance:**

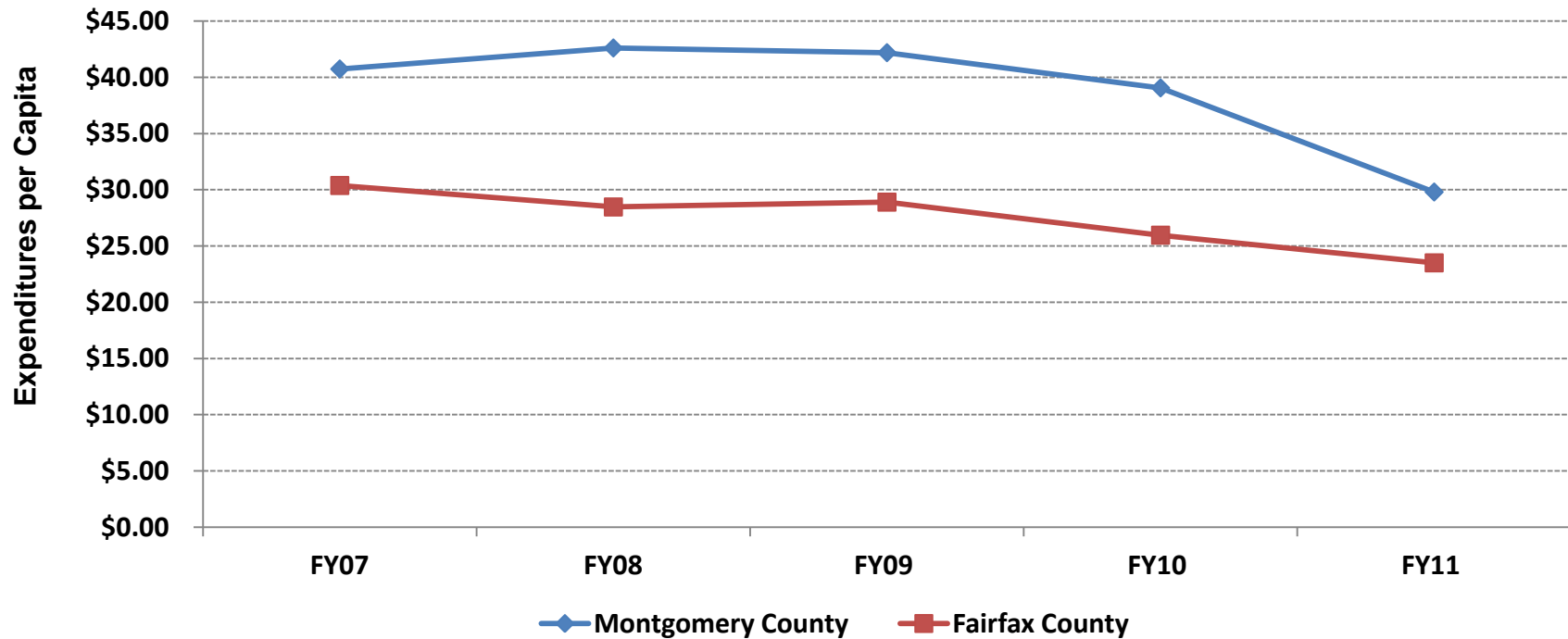
- Reduction in cost per circulation is not always good, must be viewed in context of customer access to services
- 30% staff reduction since FY08, 45% materials reduction FY11, other cost reductions lowered costs and reduced circulation of materials
- Cost reduction measures (paper savings, branch supplies, contract reductions) that did not impact services

- **Departmental Explanation for FY12-FY14 Projections:**

- Increase in circulation and staffing due to re-opening of renovated branches
- Continued efforts to improve efficiency and reduce costs (includes Gain Sharing program participation, and other departmental efforts)
- Materials budget increase for FY12, ability to maintain more appropriate resource levels going forward
- Technology, Facility, and Department Strategic Plans



Supporting Measure: Expenditures Per Capita



Jurisdiction	FY07	FY08	FY09	FY10	FY11
Montgomery County	\$ 40.74	\$ 42.61	\$ 42.19	\$ 39.06	\$ 29.80
Fairfax County *	\$ 30.38	\$ 28.47	\$ 28.90	\$ 25.96	\$ 23.50

* Includes Population for City of Fairfax



Headline Measure 4: Percent Of Library Customers Satisfied Based On Library Customer Survey Results

2008 Survey Overview

- Open from 13 April to 19 April 2008
- 8,036 respondents
- Administered via paper surveys at all branches

2011 Survey Overview

- Open from 10 April to 21 April 2011
- 7,789 respondents
- Administered via online survey as well as via paper
- Advertised survey during National Library Week on County website, Facebook, and other partner websites

MCPL Customer Satisfaction Survey 2011

Please help us improve the delivery of library services and programs by completing this survey. The answers you provide will be kept strictly confidential.

1. In general, over the past year, what were your main reasons for using the library? Please check all that apply.

- ☐ Educational purposes (for homework, research or to take a class)
- ☐ Entertainment (source free material for reading, viewing or listening)
- ☐ Information (health, jobs, financial, news, business, travel, etc.)
- ☐ Borrowed books and/or other materials
- ☐ Read newspapers or magazines
- ☐ Used the computer and/or Internet services
- ☐ Meet up with friends
- ☐ Attended a program or meeting
- Other (please specify):

2. How often do you usually visit the library? Please check one answer.

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Several times a year
- ☐ Only on my first visit to MCPL
- ☐ Don't recall

3. Which of the following statements best describes how frequently you use the library website?

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Several times a year

2011 Online Survey

FY09	FY10	FY11	FY12 Projection	FY13 Projection	FY14 Projection
96%	N/A	91%	N/A	TBD	N/A



CountyStat Overview of Initial Survey Findings

- Survey respondents represent a good sample population of high volume MCPL customers as over 50% visit on a weekly basis and 36% use the website with similar frequency

Library Visits	
7.8%	Daily
0.8%	Don't recall
27.1%	Monthly
8.8%	Several times a year
0.7%	Today is my first visit to MCPL
54.8%	Weekly

Library Website Visits	
8.8%	Daily
3.7%	Don't recall
25.7%	Monthly
8.9%	Never
16.6%	Several times a year
36.3%	Weekly

- 5% of survey respondents noted dissatisfaction with the overall library experience

While demonstrating the lowest overall ratings in the 2008 survey, all technology and programming categories experienced the greatest improvements in satisfaction rating

Lowest Ranked Categories Amongst Dissatisfied Survey Participants	
Programs and Services: Relevance: Adult Programs	3.93
Collections and Materials: Books et al	3.91
Collections and Materials: Downloadable	3.81
Programs and Services: Quantity: Juvenile Programs	3.81
Programs and Services: Relevance: Teen Programs	3.77
Collections and Materials: Hold time	3.72
Collection and Materials: Availability	3.67
Programs and Services: Quantity: Teen Programs	3.48



MCPL Survey Satisfaction Rate Change From 08 to 11

In the two focus areas of MCPL since the last survey, technology and programming, all categories experienced the greatest improvements in satisfaction rating

Category	2008 Score	2011 Score	Change
Programs and Services: Relevance: Adult Programs	6.71	7.49	0.78
Programs and Services: Relevance: Teen Programs	6.53	7.08	0.55
Programs and Services: Relevance: Juvenile Programs	6.96	7.49	0.53
Programs and Services: Quantity: Adult Programs	6.61	7.06	0.45
Programs and Services: Quantity: Teen Programs	6.51	6.90	0.39
Programs and Services: Quantity: Juvenile Programs	6.87	7.09	0.22
Technology: Computers: PAC	7.36	7.48	0.12
Technology: Help	7.24	7.33	0.09
Technology: Computers: Internet	7.13	7.20	0.07
Technology: Catalog	7.37	7.40	0.03
Technology: Website	7.34	7.36	0.02
Building Amenities: Safety	7.93	7.94	0.01
Building Amenities: Lighting	8	7.97	-0.03
Collections and Materials: Displays	7.57	7.52	-0.05
Customer Service: Helpfulness	8.21	8.16	-0.05
Collections and Materials: Downloadable	6.92	6.85	-0.07
Building Amenities: Layout	7.7	7.62	-0.08
Customer Service: Courtesy	8.19	8.10	-0.09
Building Amenities: Space	7.59	7.50	-0.09
Building Amenities: Cleanliness	8.08	7.82	-0.26
Customer Service: Availability	8.06	7.77	-0.29
Collections and Materials: Books et al	7.45	7.15	-0.30
Collection and Materials: Availability	7.52	7.19	-0.33
Collections and Materials: Hold time	7.35	7.00	-0.35
Customer Service: Convenience of Hours	7.62	7.02	-0.60



Headline Measure 4:

Percent Of Library Customers Satisfied

Based On Library Customer Survey Results

- **Departmental Explanation for FY11 Performance:**
 - Improvements:
 - Follow-up surveys and actions taken in areas of technology and programming to improve performance
 - Declines:
 - Reduction in staffing available, hours, and materials due to budget reductions (staff is less available, hours are less convenient)
 - Facility issues due to aging infrastructure, renovations, budget cuts (Cleanliness, closures, running out of basic supplies like toilet paper, longer to do basic maintenance like lighting, grass cutting)
- **Departmental Explanation for FY12-FY14 Projections:**
 - Department Strategic Plan implementation (continued for 2007 – 2012 plan, new plan for 2013 – 2016)
 - Technology Plan, Facilities Strategic Plan
 - Continue to advocate for restored investment in library services



Headline Measure 5: Return on Investment

(Under Construction)

Return on Investment is a new Headline Measure proposed by MCPL to measure services impact in terms that monetize the value of library service to residents

- MCPL adopted best practices from other library studies, particularly Massachusetts Library Association, University of North Carolina (for Charlotte Mecklenburg Public Library)
- At least three types of value can be discussed
 - **Direct Return on Investment** (Value & Savings versus Costs)
 - **Economic Development** (community asset, property values, value added by local procurement and staffing outlays)
 - **Intangible Value** (value of improvements to customer's quality of life made possible by library services)
- For this draft, MCPL on Direct Return on Investment



Headline Measure 5: Return on Investment

Step 1: Calculating Value of Services Created

Element	Services Provided	Total Value	Value per Unit	Method
Library Materials Services				
Library Holds Fulfilled	578,176	\$ 3,260,912.64	\$ 5.64	Shipping Savings
Interlibrary Loans Fulfilled	19,506	\$ 487,650.00	\$ 25.00	Savings Vs. Purchase
In-House Use of Library Materials	1,067,066	\$ 22,919,810.53	\$ 31.31	
Checked out Library Materials	7,456,619	\$ 169,720,033.64	\$ 31.31	
Downloadable E-Book and AudioBook (Overdrive Epub and PDF)	34,258	\$ 513,870.00	\$ 15.00	
Downloadable Audio Circulation (netLibrary+Overdrive WMA, MP3)	64,632	\$ 643,088.40	\$ 9.95	
Electronic Database Use (Downloads)	1,099,375	\$ 8,102,393.75	\$ 7.37	
Electronic Database Use (Reference USA)	963,634	\$ 240,908.50	\$ 0.25	

For example, MCPL calculates the value of *Interlibrary Loans Fulfilled* by using Amazon.com average price, plus shipping and handling



Headline Measure 5: Return on Investment

Step 2: Summary of Services Value Created

Summary of Services Value Created	
Savings for Customers by Using Free Information Services (consultation with librarians, programs, public access computers, basic literacy tutoring and English as a Second Language classes)	\$ 17,049,713.84
Savings for Customers by Using Free Library Materials	\$ 205,888,667.46
Savings for Customers by Using Other Services (meeting room rental)	\$ 345,089.08
Total Value Est.	\$ 223,283,470.38

MCPL calculates the total value of services offered by generating estimates for the value of services offered compared to private sector options and then grouping them into thematic units



Headline Measure 5: Return on Investment

Step 3: Calculating Total Return on Investment

Value Returned on each \$1 Invested by Community	\$ 8.60
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Total Services Value Created (Savings)	\$ 223,283,470.38
Less Total Library Expenditures to Provide Services	\$ (28,930,203.49)
Less Rough Estimate Other County Costs for Libraries	\$ (3,500,000.00)
Plus Revenues, Aid, Grants	\$ 6,462,274.70
<u>Estimated Total Costs to Provide Services</u>	<u>\$ (25,967,928.79)</u>

Estimated Net Value of Services	\$ 197,315,541.59
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Net Value Per Household (363,750 Households)	\$ 542.45
Net Value Per Capita (971,400 residents)	\$ 203.12
Net Value Per Cardholder (686,777 card holders)	\$ 287.31

MCPL estimates that for each dollar invested, they return a value of \$8.60 to the community



Headline Measure 5: Return on Investment

(Under Construction)

■ Contributing Factors

- High customer interest and demand in library services
- High quality service provision, efficient and effective staff
- For this measure, a wide base of jurisdictions who calculate their return on investment (MA, FL, NC, SC, IA others)

■ Restricting Factors

- Substantially reduced Investment in library services at a time when interest and demand is rising
- Closure of two major facilities for longer than the absolute construction period
- Time and resource restrictions (in calculating this measure)

■ Action Plan for FY12

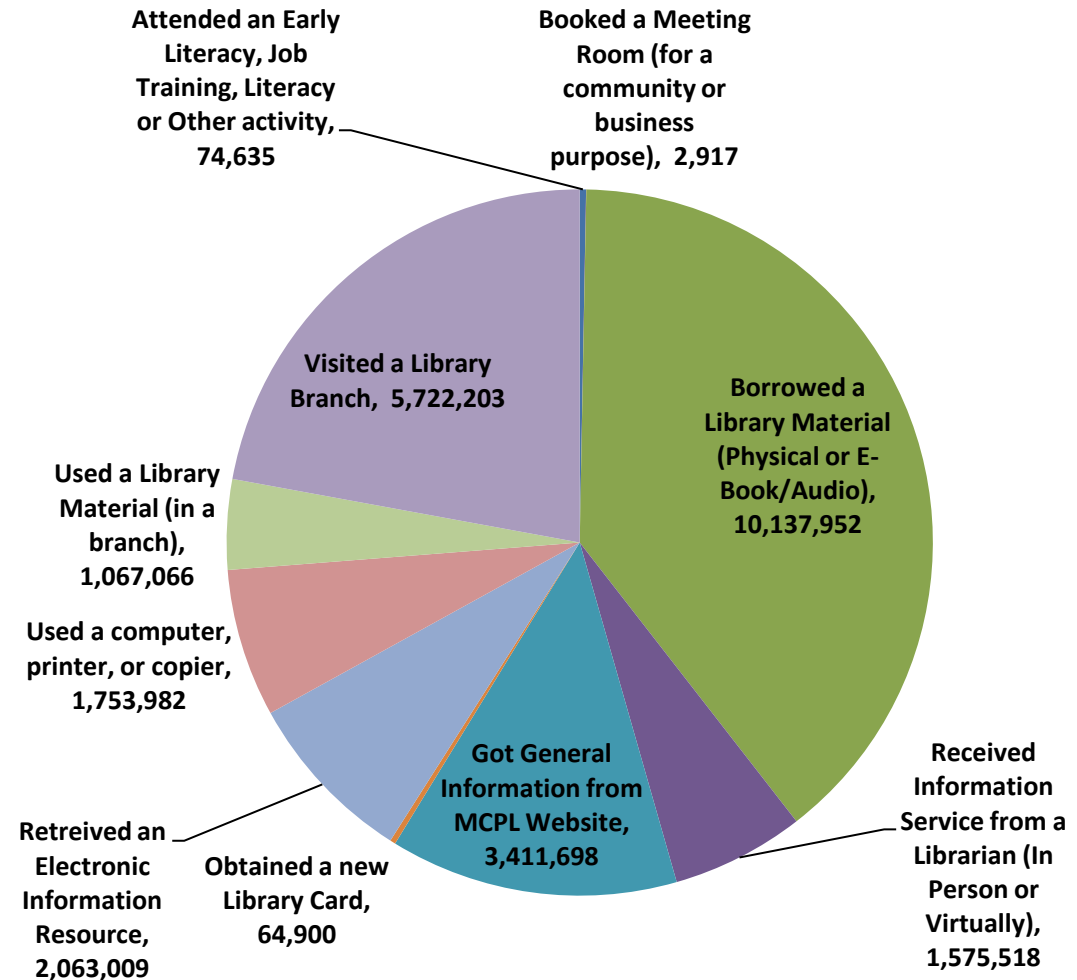
- Achieve concurrence of CountyStat, OMB, CAO, and CE on methods for this measure
- Publish results regularly
- Add estimations of economic development value, and where possible, life enhancement value to future calculations



Headline Measure 6: Total Library Use

(Under Construction)

- People's use changes (both in short-term and long-term), but there are a diversity of uses, and they are growing over time
- 26 million uses per year equates to 78,000 uses per service day, or 525 uses per each of approximately 49,100 service hours in FY11
- Staff multi-task and provide multiple services (Ex. Librarians program, contribute to management of collection, provide information services, and manage some of the practical transactions that constitute a service use)



CountyStat Reflections on Proposed Headline Measures 5 & 6

- The calculation of return on investment assumes that the intrinsic value of library book use is the same as book ownership
- The return on investment methodology should more explicitly articulate the methodology for calculating of Other County Costs for Libraries
- MCPL should also develop supporting measures for the Return on Investment Headline measure that capture the efficiency of operations
 - Other jurisdictions measure efficiency in terms of cost per capita, cost per visit, cost per registered cardholder, and cost per citizen contact
- MCPL should also develop supporting measures for the Total Library Use Headline Measure that track each of the components on an individual basis
 - Tracking each component will allow for more operational monitoring and allow MCPL to quickly adapt to changing customer needs



Linking Performance Measures to Budgetary Programs

- CountyStat and the Office of Management and Budget are coordinating efforts with departments to outline the linkages between existing budgetary program and headline performance measures
- This exercise is the first in a series that will create a closer linkage between budgeting and performance management

Budget Book Programs

PROGRAM DESCRIPTIONS		
Aquatics		
The Aquatics program provides recreational, fitness, instructional, competitive, therapeutic, and rehabilitation water activities that serve all residents. The Department operates seven regional outdoor pools, as well as five indoor aquatic facilities, and a neighborhood open pool. The outdoor pools serve the public 17 hours each day, 7 days a week, approximately 340 days a year. The indoor pools and the open pool operate from November 1st through Labor Day weekend.		
FY12 Approved Changes	Expenditures	WY%
FY12 Approved	\$,000,000	122.8
Reduce Operating Income State Center closed until 11/1/13 for renovation (Phase September)	160,000	-3.7
Performance adjustments, including reduction of employee benefits, employee benefit changes, changes to staff benefits, organizational, and other budget changes affecting expenditures and salaries	128,750	2.8
FY12 Approved	\$,000,000	122.2
Countywide Programs		
Countywide programs provide a variety of activities for youth and adults. The programs include Youth and Adult Sports, Camps, Classes, Therapeutic Recreation, Teen Youth Services, Trips and Tours, and support to Special Events.		
The Sports program educates and delivers extensive programs in adult sports and select youth leagues throughout the County. The adults, competitive leagues and tournaments are offered seasonally in soccer, flag football, volleyball, basketball, and softball.		
The department provides over 30 camps in Montgomery County for children ages 4-13 that are fun, safe, convenient, and affordable. Little People Camps offer an exciting five week of summer camps, six camps provide opportunities to develop children's creativity; sports camps empower children with sports and sports skills activities. There are also one-of-a-kind camps, including Employment in Science and On-the-Go. Creative Theater gives campers a taste of producing a real musical. Extended hours provide parents with		
© 2014 Libraries, Culture, and Recreation FY12 Operating Budget and Public Services Program FY12-17		

Linkage of Budget Programs to Performance

Circulation per Capita

Collection and Technology Mgt.
FY12 Approved: \$6.5M 22.5WYs

Headline Performance Measures

Item	Measure Text	Target	Actual 2010	Previous 2009	Year Goal	Performance
101	Total number of repeat registrations in recreation programming	26,000	18,873	47,294	FY10	↓
102	Percent of participants who reported an unsolicited response and being asked to be a volunteer or make a donation	26,000	81.0%	87%	FY10	↔
103	Percent of participants who reported an unsolicited response and being asked to be a volunteer or make a donation	26,000	1,140	1,000	FY10	↑
104	Percent of County residents registered through the Department of Recreation by age group	26,000	8.3%	9.7%	FY10	↔
105	Percent of youth registered in Positive Youth Development Programs who report program participation benefits	26,000	90%	75%	FY10	↑
106	Percent of County residents registered through the Department of Recreation - under 5 years old	26,000	1%	12.5%	FY10	↔
107	Percent of County residents registered through the Department of Recreation - 5 to 14 years old	26,000	21%	23%	FY10	↓
108	Percent of County residents registered through the Department of Recreation - 15 to 24 years old	26,000	1%	1.2%	FY10	↔
109	Percent of County residents registered through the Department of Recreation - 25 to 34 years old	26,000	4.3%	4.7%	FY10	↔
110	Percent of County residents registered through the Department of Recreation - 35 to 44 years old	26,000	4.3%	4.7%	FY10	↔
111	Percent of County residents registered through the Department of Recreation - 45 to 54 years old	26,000	85.0%	91.0%	FY10	↓



MCPL Linkage Between Headline Measures and Budget Programs

Headline Measures

Circulation
per Capita

Visits per
Capita

Cost Per
Circulation

Customer
Satisfaction

Return on
Investment

Total
Use

Budget Programs

Collection and Technology Management

FY12 Approved: \$6.5M 22.5 WYs

Library Services to the Public

FY12 Approved: \$18.7M 244.1 WYs

Administration, Outreach, and Support Services

FY12 Approved: \$3.2M 21.4 WYs

MCPL's three programs all contribute to each of the headline measures.



Wrap-Up and Follow-Up Items

